2011

Carlingford Business Survey, 2011

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Carlingford and Cooley Peninsula Business Survey 2011

DIT-ACHIEV Project: *Achieving Sustainability in Carlingford & Cooley*

The DIT-ACHIEV Model for the Sustainable Management of Tourism has been developed by the College of Arts and Tourism, Dublin Institute of Technology and is endorsed by the Environmental Protection Agency and Fáilte Ireland. It explores six areas of investigation - Administration, Community, Heritage, Infrastructure, Enterprise and Visitor.

The purpose of piloting this DIT- ACHIEV Model in Carlingford & the Cooley Peninsula is to test its use with the objective to refine and adjust its methodology, so that it can be applied in any Irish tourism destination. Early indications are that the Model will provide the Irish Tourism Industry with a valuable tool for making its product and management far more sustainable. In addition to data such as environmental measurements, information on water, waste, energy, transport, examination of local cultural, environmental and employment statistics, the model requires the undertaking of three dedicated surveys:

- A Resident Survey
- A Business Survey
- A Visitor Survey

With the support of local volunteers and students, a year-long Visitor Survey has taken place throughout Carlingford and the Cooley Peninsula. A survey of residents was undertaken at the outset of the year and this **Business Survey** was run during the first 6 months of 2011. This publication presents an overview of the findings from the on-line and face-to-face survey of 200 Carlingford & Cooley Peninsula businesses.

This report presents the attitudes and opinions of Carlingford & Cooley businesses regarding tourism and while issues have emerged, the general response to the survey is that local businesses strongly support tourism.

Note: Given the number of respondents is relatively small, caution should be taken when reviewing this top-line report.

Project Highlights

In early 2010 a group of researchers from the Dublin Institute of Technology (DIT) began working with a team in the Carlingford and Cooley Peninsula to explore the sustainability of tourism in the area and plan for its future management.

Team Carlingford and Cooley is composed of seven local partners:

- Carlingford & Cooley Tourism Association
- Carlingford Community Development
- Carlingford Tidy Towns
- Carlingford Heritage Trust
- Dundalk Chamber of Commerce
- Loughs Agency
- Louth County Council

During the past 20 months Team Carlingford and Cooley have met regularly with the DIT researchers and representatives of the two funding agencies—the Irish Environmental Protection Agency and Fáilte Ireland. The following are some of the key activities that have taken place:

In April 2010 very well attended public consultation meetings took place to identify the key issues and challenges for tourism in Carlingford and the Cooley Peninsula. The wide range of representation at this meeting resulted in the identification of numerous potential sustainable tourism indicators.

In October 2010, Carlingford hosted an International Expert Panel Meeting where guests enjoyed the best of Carlingford hospitality hosted by the Carlingford Cooley Tourism Association (CCTA). The main business of the weekend was a detailed workshop with the Expert Panel discussing and analysing the project to date and adding their expertise from around the world.

Articles have appeared in local papers such as the Dundalk Democrat and The Argus and the project has also been profiled in national media such as Hotel and Restaurant Times which dedicated a two page spread to the project.

A number of presentations have been made by the project team at national and international conferences, raising the profile of the project and the Carlingford and Cooley Peninsula.

The Model is simultaneously being piloted in Killarney Town & Valley.

Oct 2011

Profile of Businesses who Answered Survey

This survey took place with 200 businesses in Carlingford & Cooley between April and June 2011. The survey was conducted face to face and online.

The response rate was 51% which meant 102 businesses responded to the survey. While this response rate is considered relatively good, ensuring an average level of validity was obtained, technically speaking, the results cannot be generalised with a confidence level of 95%, and thus caution should be taken when reviewing them.

Location of Business: 42% of businesses are located within Carlingford Town, 51% are located outside of Carlingford Town but in the Cooley Peninsula and 7% are located in both the town and the Cooley Peninsula.

Length of Operation: The average length of time which the responding businesses have been in operation is 25 years, with some businesses in operation up 150 years and a number of businesses in operation for one year.

Main Business Activity: 36% of those surveyed (**See Figure 1**) indicate that 'Hospitality / Tourism' is their main business activity, 25% are in Retail, 23% are in general Services, 10% are in Manufacturing and only 1% are in Finance/ Professional Services. 5% indicated that their main business activity is in 'Other' areas such as farming, healthcare & training.

Ownership of Premises: 70% own their own premises, 28% rent their business premises and 2% both own and rent their business premises.

Size of Business: The respondents to the survey between them employ in the region of 790 full-time employees and 589 persons who they classify as part-time, casual and seasonal. The high reliance on part-time and seasonal workers is a key feature of employment in Carlingford & the Cooley Peninsula. (**See Figure 2**). Furthermore, the micro-SME nature of businesses is highlighted by the small number of employees at all levels. **Figure 2** shows the average number of staff employed for business by each category—Permanent Full-Time (8.25 employees), Contract Full-Time (5.11), Part-Time (5.35), Casual (3.82) and Seasonal (6.57). However, the most frequently mentioned number for each category employed (removing maximum & minimums) is as follows: 2 permanent full time, 2 contract full-time, 2 part-time, 1 casual & 1 seasonal employee.

Figure 1: Main Business Activity (%)

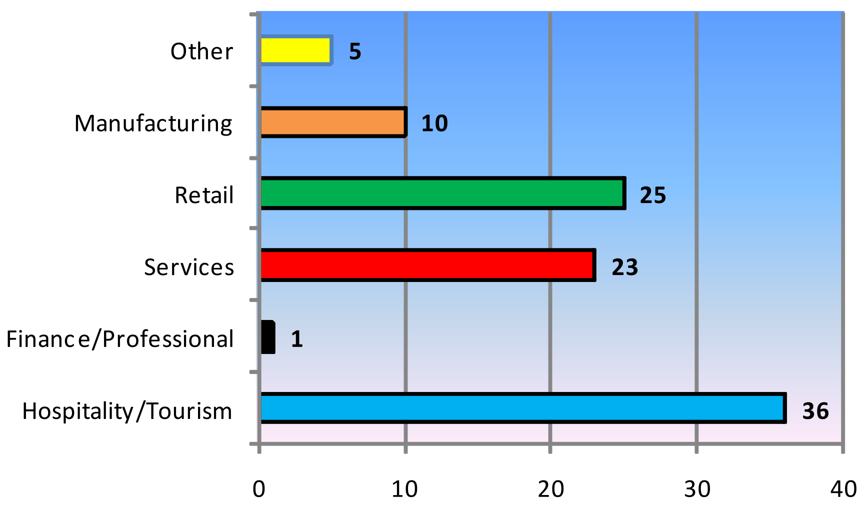
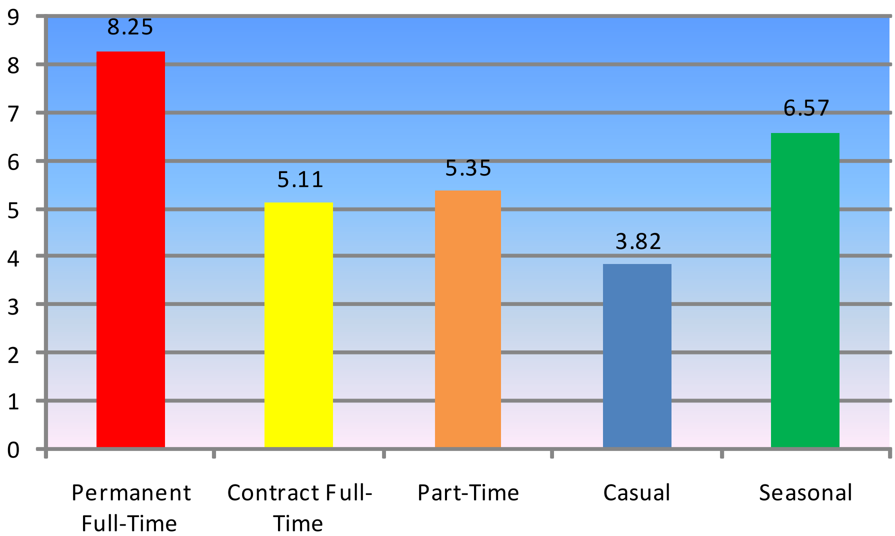


Figure 2: Average Number of Staff Employed per Business (Number)



Importance of Tourism

Degree to which Business activity relates to Tourism: The high dependence on Tourism in Carlingford and Cooley is evident by the fact that a large portion of respondents indicate their business activity is either 'directly' (30%) or 'indirectly '(47%) related to tourism (**See Figure 3**). A further 23% note that their business activity is both directly and indirectly related to tourism.

***Degree to which Businesses rely on Tourism:* Figure 4** shows that 18% of all businesses surveyed are 100% reliant on tourism, while 14% are not at all reliant on the tourism industry. Almost two-thirds (62%) are at least 50% or more, reliant on tourism.

Figure 3: How Business Activity Relates to Tourism (%)

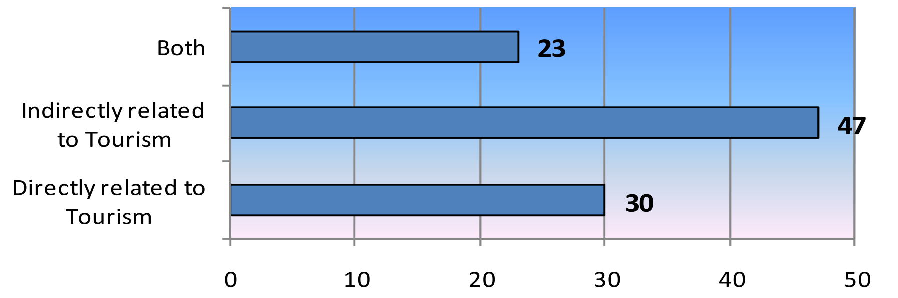


Figure 4: Level of Reliance on Tourism (%)

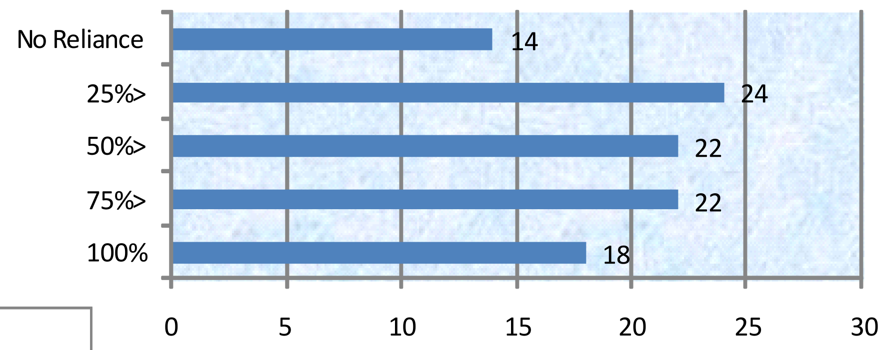


Figure 5: Opinion of Rent in Carlingford & Cooley (%)

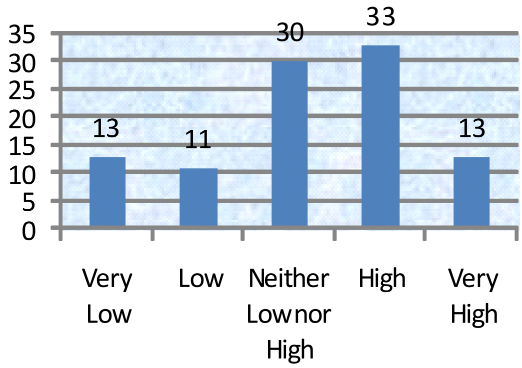
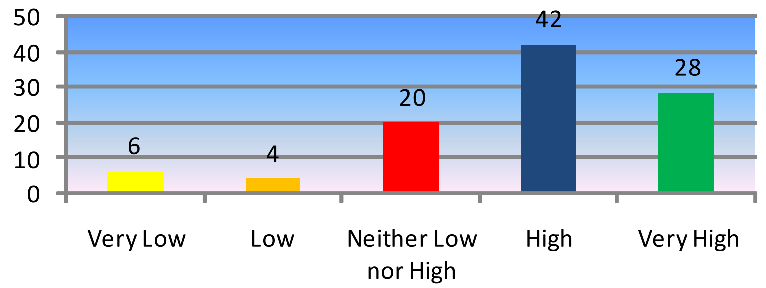


Figure 6: Opinion of Commerical Rates in Carlingford & Cooley (%)



Doing Business in Carlingford (Rates)

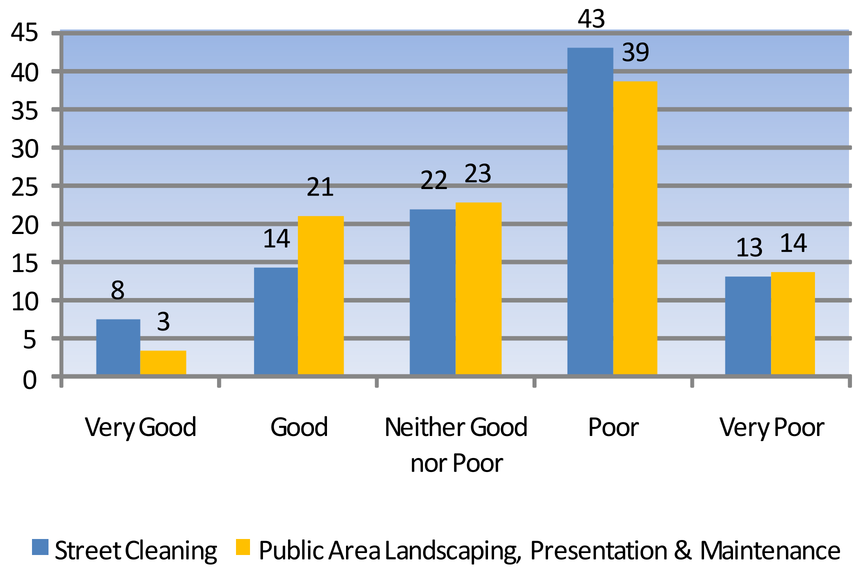
Rent Levels: 46% of respondents felt rent levels in Carlingford and Cooley are either high (33%) or very high (13%) (**See Figure 5**)

Payment of Commercial Rates: 70% felt commercial rates are either high (42%) or very high (28%).(**See Figure 6**).

Value for Money for Rates: When specifically asked to rate value for money in terms of specific services:

- 56% are dissatisfied with Street Cleaning (poor & very poor)
- 53% are dissatisfied with Public Area Landscaping, Presentation & Maintenance) (**See Figure 7**).

Figure 7: Opinion on Management of Local Environment (%)



Doing Business in Carlingford & Cooley (Costs / Finance)

Operating Costs are considered very high for finance, high for labour and relatively high for insurance costs (**See Figure 8**). Labour costs are seen to be high (32%) or very high (15%) by 47% of businesses. Insurance is considered to be high (15%) or very high (15%) by 30% of companies and 57% of respondents see Finance Cost as high (39%) or very high (18%). However, one quarter of respondents did feel insurance costs were low.

Doing Business in Carlingford & Cooley (Infrastructure)

Access to Broadband Services: 52% indicated that access to broadband services was either Poor (44%) or Very poor (8%) as shown in **Figure 9.** Level of awareness of actual broadband speeds was low (27%), with 3MB being the main speed mentioned.

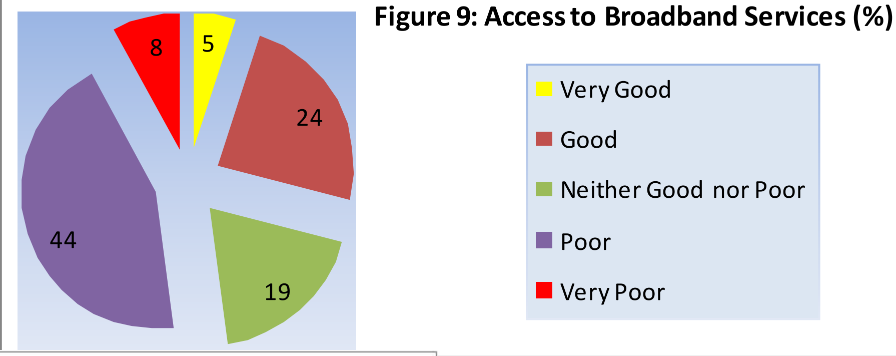


Figure 9: Access to Broadband Services (%)

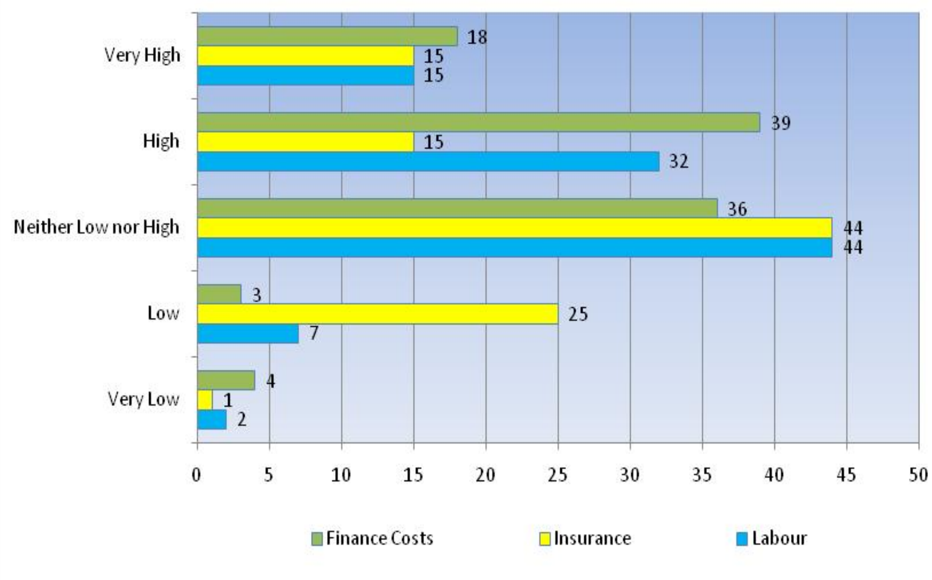


Figure: 8 Business Operating Costs (%)

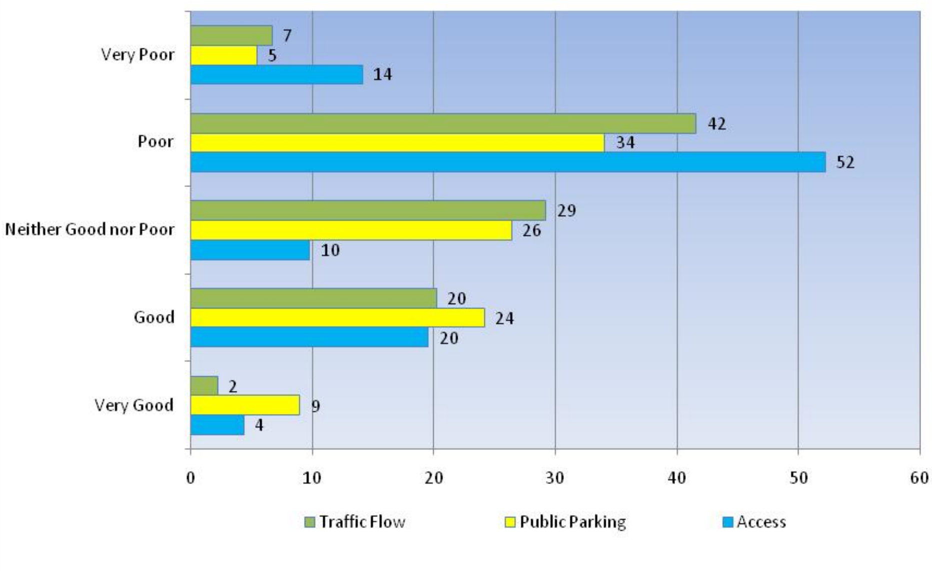


Figure 11: Business Infrastructure in Carlingford (%)

Rating of Energy Costs: Over three quarters of respondents were dissatisfied with current energy costs with 48% rating it as High and 29% rating it as Very High. (**Figure 10**).

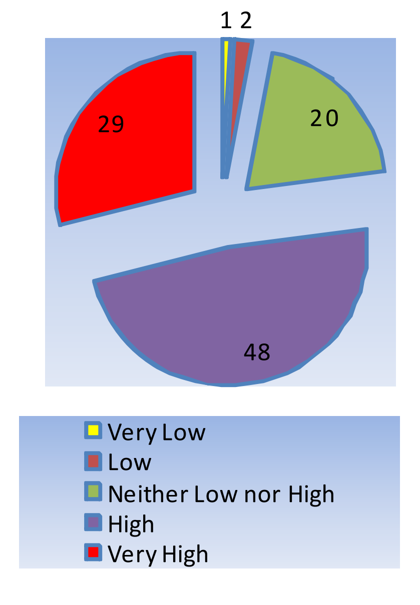


Figure 10: Energy Costs (%)

Rating of Infrastructure: 66% felt that access in the area is either Poor (52%) or Very Poor (14%), while 24% feel it is Good (20%) or Very Good (4%) (**See Figure 11**). A further 33% are satisfied with parking, while 39% are dissatisfied.

Almost half are dissatisfied with traffic flow with 42% stating it as Poor and 7% as Very Poor.

Sustainable Practices

Awareness of Sustainability: 72% indicated their business was familiar with the concept of sustainability (44% familiar & 28% very familiar) (**See Figure 12**).

Figure 13: Written Sustainability Policy (%)

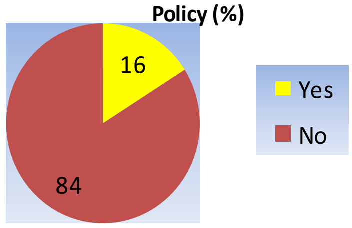
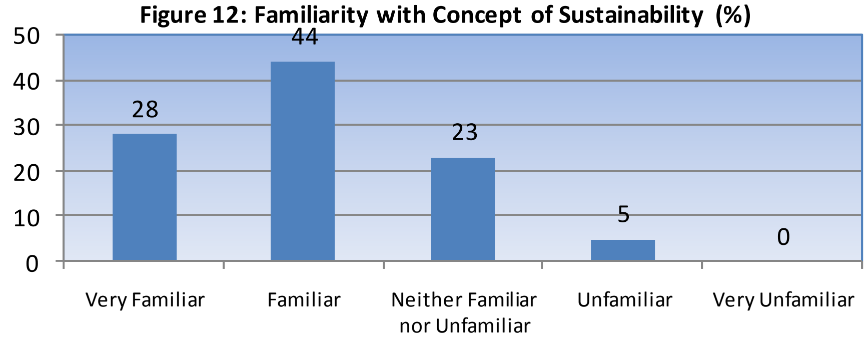


Figure 12: Familiarity with Concept of Sustainability (%)



Sustainable Business Policies: Despite the strong awareness of sustainability, only 16% (13 businesses) admitted to having a sustainability policy for their business (**See Figure 13**).

Active Sustainable Business Management: Respondents were asked to indicate the degree to which they actively manage energy usage, waste and water usages in order to be more responsible. **Figure 15** shows that 87% of businesses actively managed their energy usages to make it more responsible, 91% actively managed waste and 79% actively managed water usage.

When asked to provide more specific information pertaining to environmental / sustainable policies, businesses displayed a variety of answers. In broad terms respondents seem to be aware of policies etc with 81% claiming to use recycled products such as paper and ink cartridges and 75% being up to date with relevant environmental legislation. However when practical indicators are examined only 39% have an Environmental Action Policy in use, 36% make their customers aware of such a policy and only 21% have a Green Team in place. In contrast businesses were asked to consider Health and Safety legislation, which is strictly enforced - 93% of respondents claim to be up to date in this regard. (**See Figure 14**).

Figure 15: Active Environmental Management to ensure greater responsibility (%)

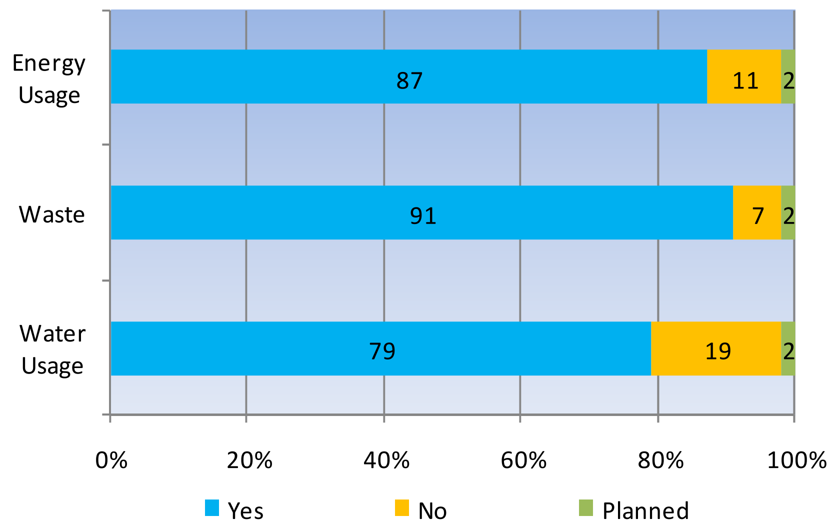
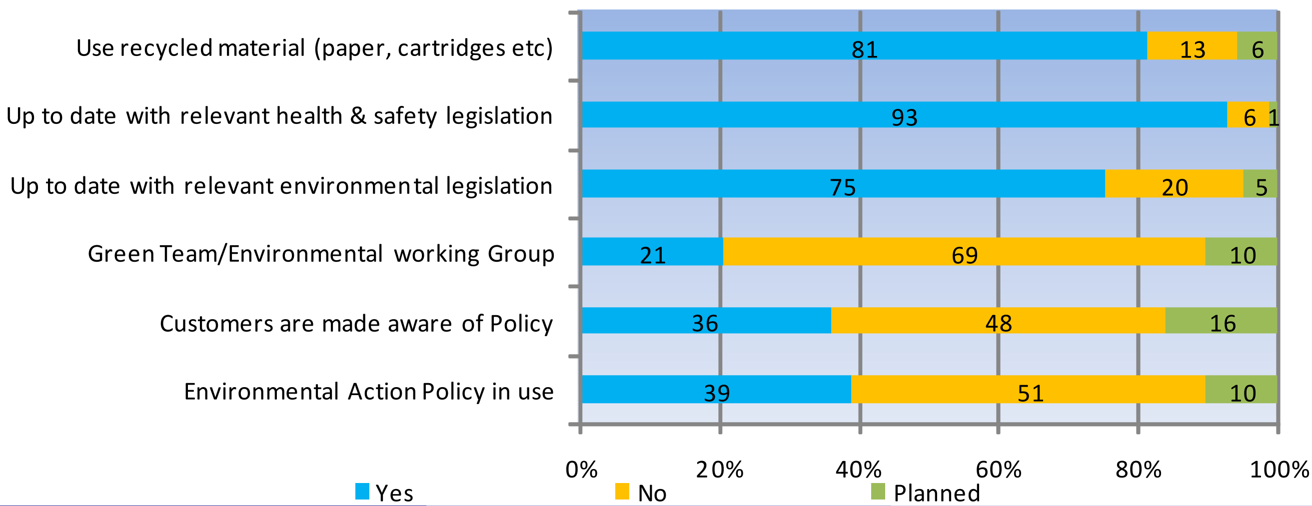


Figure 14: Business & Environmental Practices (%)



Participation in Recognised Sustainability Initiatives

Participation in Recognised Initiatives: Despite environmental and sustainable awareness, there is a very low level of participation, planned participation or awareness of a number of national and European environmental initiatives (**See Figure 16**). Although most of the listed initiatives are tourism / hospitality specific and, as outlined previously, given that 77% of businesses surveyed claim to be either directly or indirectly involved in tourism, there is little involvement in any of the initiatives, apart from Tidy Towns which more than half of respondents (57%) participated in.

Environmental Certification / Corporate Social Responsibility

Environmentally Friendly Certification: Only 22% have indicated that their business has been awarded Environmentally Friendly Certification other than that listed on Figure 16. These included Enterprise Ireland Bi-Annual Audit, Looking Good Award & Best Presented Shop Frontage Louth.

Corporate Social Responsibility (CSR): Only 11% of businesses have a CSR Policy. Practices investigated included encouraging staff & customers to use public or other environmentally friendly transport & supporting responsible purchasing. (**See Figure 17**). Only 3% (3 Businesses) have been awarded formal CSR Certification. The ones noted were Best Window Frontage, Environment Award and Health & Safety Award.

Over one third (34%) feel their local built, natural & cultural environment is not utilised to its maximum potential without compromising it. Examples given of how it is not utilised to its maximum include; lack of harbour development, closure of facilities (e.g. castle, tower at Heritage Centre), poor traffic calming, derelict buildings, greater accessibility needed for coastline & lough, lack of local music & culture for tourists & lack of landing opportunities at Carlingford Lough.

Figure 16: Participation of Businesses in Recognised Environmental Initiatives (%)

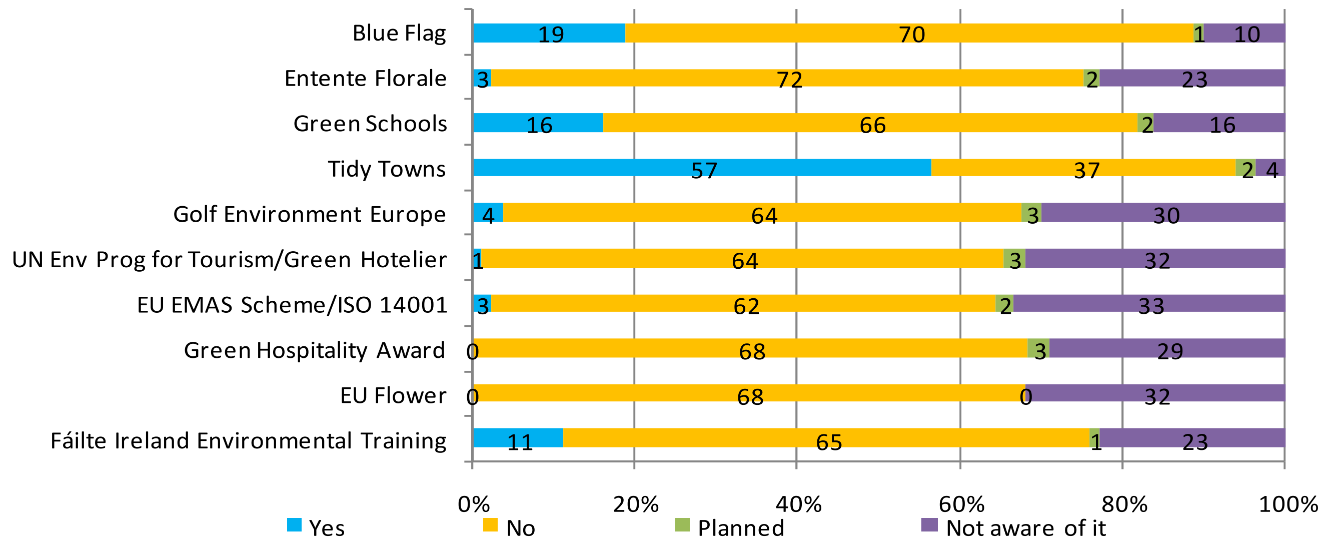
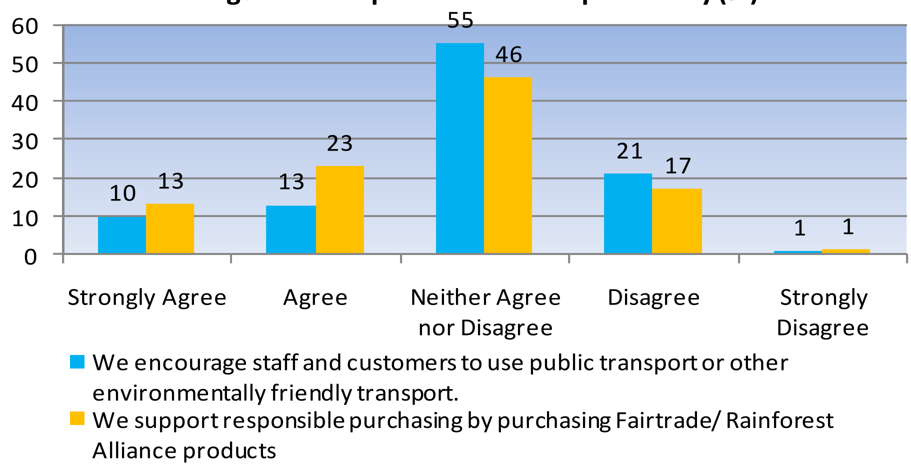


Figure 17: Corporate Social Responsibility (%)



Initiatives Concerning Disabilities

71% indicated they comply with all relevant regulations regarding disability access.

Measures taken to facilitate clients with a disability included accessible toilets, access ramps, automatic doors, elevators, removal of steps, ground floor bedrooms, wider doors & activities for specific disability groups.

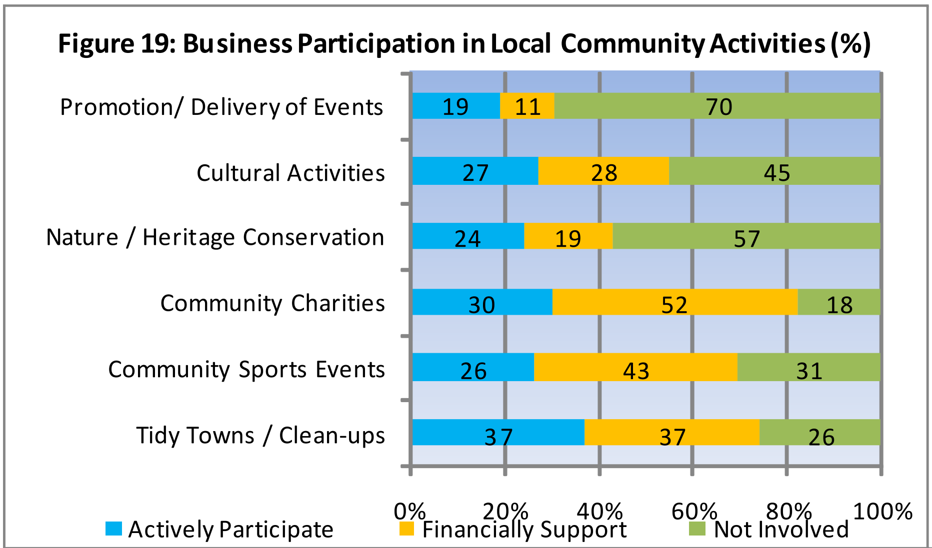
Sustainable Working Initiatives

When asked about initiatives to demonstrate positive attitudes in the workplace and good treatment of staff, results were highly positive. 84% provide flexible and reasonable work hours, 87% set fair salary levels, 87% comply with, and exceed health and safety measures and 76% provide continuous development to all staff. However, the businesses not actively agreeing with the statements outlined in **Figure 18** are of some concern.

Figure 18: Sustainable Work Initiatives (%)	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree
We enable employees to have a good work life balance through flexible, reasonable working hours.	38	46	16	0	0
We set fair salary levels through consistent and transparent policies.	34	53	12	1	0
We comply with and exceed the health and safety measures required by law.	44	43	12	1	0
Employees at all levels receive continuous development to enhance their long-term employability.	28	48	22	2	0

Business Involvement with local Initiatives

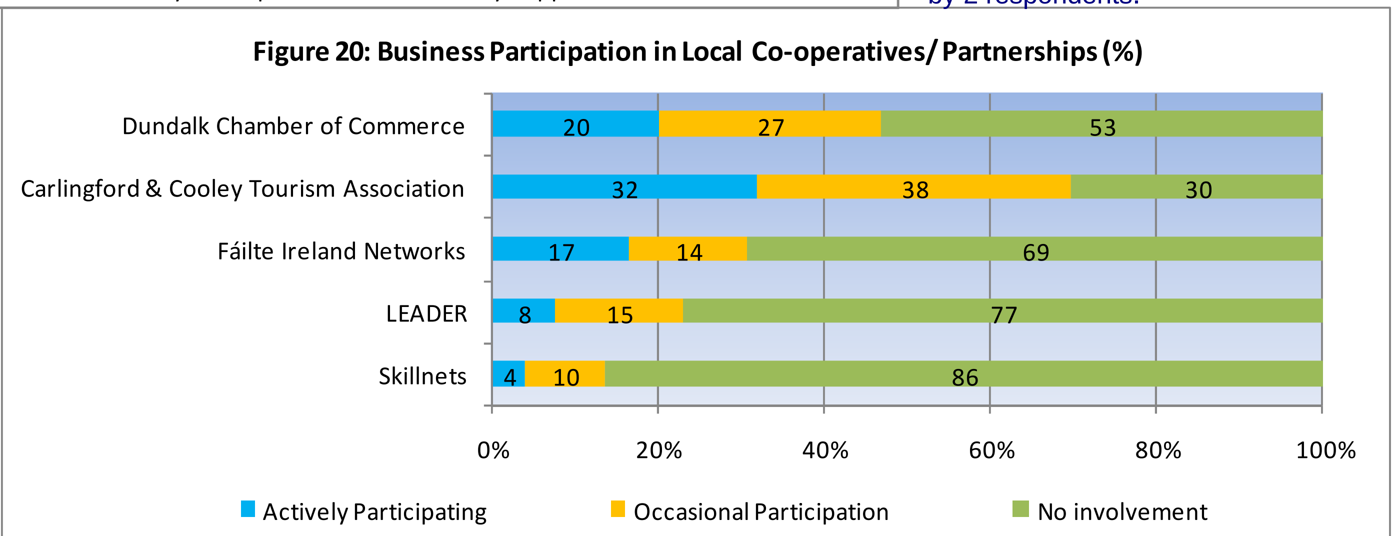
Involvement with Local Community Activities: Direct involvement by businesses in some local community initiatives is quite poor. Only 37% of businesses are actively involved with Tidy Towns / Clean-ups, however a further (37%) assist through financial support (**Figure 19**). 69% are involved with Community Sports Events either through active participation (26%) or Financial Support (43%). The most supported activity is Community Charities which businesses assist through active participation (30%) or financial support (52%). The level of support for Promotion, Conservation & Culture is quite low.



Partnerships / Networks

Involvement with Networks, Local Partnerships, Co-operatives: Networking among respondents appears to be very strong, with Carlingford & Cooley Tourism Association (70%) - 32% actively participating & 38% participating occasionally. Involvement with Dundalk Chamber of Commerce is also relatively good, with 20% actively participating & 27% occasionally participating. Involvement with other groups is quite low with only 4% actively participating in a Skillnet, 8% with LEADER and 17% with Fáilte Ireland Networks. A further 15% occasionally participate with LEADER and 14% Fáilte Ireland Networks (**Figure 20**).

56% stated their business is approved/regulated by a national organisation i.e. Fáilte Ireland (10 businesses), Louth County Council (3), with HSE, VFI, IMRO, ISO, BIM, Irish Sailing Association each noted by 2 respondents.



Food Businesses

***Food:* With food and tourism being so closely linked, a number of questions in the survey asked specifically about food and its sustainability.**

25% of respondents indicated that their business is involved in food preparation / catering. This accounts for 26 businesses. These were then asked to provide more detail on their activities / practices.

85% of these 26 businesses use locally produced ingredients, sourced within a 100km radius, and 77% of these respondents indicated that their customers are advised of this policy.

According to the food businesses 61% of their ingredients are sourced locally and just 11% of food businesses source more than 90% of their ingredients locally.

23% of all ingredients are certified as organic, but this ranges from a number of businesses using as much as 30%-50% organic produce to approximately 20% of food businesses using no certified organic produce at all.

There appears to be a low level of participation in the main national sustainable food initiatives, highlighted by the fact that less than a quarter (23%) participate in the 'Just Ask' campaign and only 7% participate in the 'Food for Kids' programme. A further 27% indicated they participate in the 'Healthy Eating Initiative'. (**See Figure 21**).

Some final Comments on Treatment of Employees

Length of tenure: Businesses in Carlingford and Cooley claim to treat their employees well. This is supported somewhat by the average length of service for employees being 8.9 years.

Investment in People: 76% of companies provide some form of in-house training and facilitate continuous professional development for staff.

Overall Conclusions

The following are some of the issues which arose in the survey:

Some key issues of concern which were raised were:

- Rates and return on investment in relation to management of local environment.
- Access, Parking, Traffic Flow & Traffic Calming.
- Operating costs—finance & energy costs in particular.
- Lack of management of different visitor types & potential related anti-social behaviour.
- Lack of high speed broadband in areas included in this study

Some key positive issues which were regularly raised were:

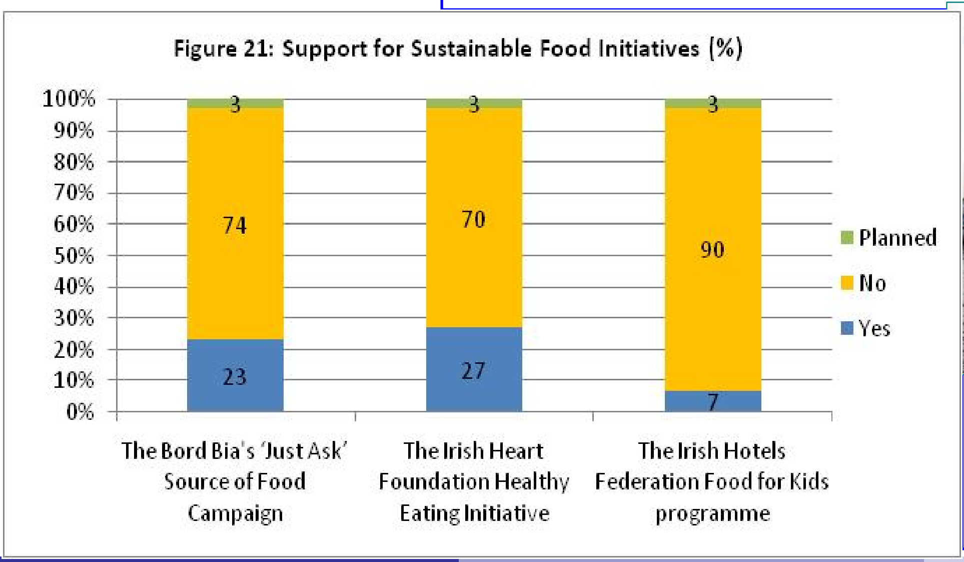
- The quality of the local landscape & buildings
- Businesses are in an excellent position to promote the area to their out of town customers.

Low Levels of Involvement in some areas are of concern :

- Cultural Initiatives / Nature & Conservation
- Environmental Policy & Initiatives - actions & awareness
- Corporate Social Responsibility
- Networking / partnerships / co-operatives / communication regarding planning
- The perceived 'closed' nature of some tourism groups.

Areas for Development

- Improved Environmental Management (e.g. litter & bin management, tree planting, protection of scenic views from development).
- Improved Management of Heritage & Culture.
- Development of the Harbour Area & Carlingford Lough
- Greater Awareness & Promotion of Carlingford & the Cooley Peninsula as a tourism destination.
- Ensure inclusion of all interested businesses in tourism development & central co-ordination of different groups towards a common goal.
- Continued growth in tourism should be supported as it is an indigenous industry with employment potential that cannot be exported.



For more details about the survey please contact Dublin Institute of Technology (DIT): Kevin.griffin@dit.ie Sheila.flanagan@dit.ie;